POLICY STATEMENT:
To promote continuity of care, a summary of significant diagnoses, procedures, drug allergies and medication is available in the medical record of patients receiving continued care at the Clinics in the Texas Tech University Health Sciences Center School of Medicine.

SCOPE:
This policy applies and will be distributed to all TTUHSC School of Medicine Clinics in Lubbock, also known as Texas Tech Physicians of Lubbock.

PROCEDURE:
1. The ‘Problem List’ combined with the Medication Sheet (blue, see 5.04.C, Medication Sheet) as applicable, constitute the summary list. A summary list including significant diagnoses, procedures, drug allergies and medications should be maintained. Any clinics not utilizing the central medical record should maintain a summary list in their individual medical record.

2. Adult Paper Summary List: is to be completed for adult patients, age 18 and over, in addition to the Medication List. (see 5.04.A, Adult Summary List, may be copied on heavy white paper).

3. Child Paper Summary List: is to be used for pediatric age patients (under age 18), regardless of clinic they are seen in. For pediatric patients, a separate medication list is not required. (see 5.04.B, Child Summary List, may be copied on heavy pale yellow paper).

4. Electronic Summary List: Reflected in the Electronic Medical Record through the Problem List and Medication Profile and Allergies.

5. The summary list should be completed by the third visit. At each additional patient visit, the Physician or their designee will update drug allergies and medications, adding any new significant diagnoses and procedures.

APPROVAL AUTHORITY:
This policy shall be reviewed and approved by the Chief Medical Officer.

RESPONSIBILITY AND REVISIONS:
It is the responsibility of the Director of Medical Records to review and initiate necessary revisions to this policy.

ATTACHMENTS:
5.04.A – Adult Summary List
5.04.B – Child Summary List
5.04.C – Medication Sheet

Signatory approval on file by: Dale M. Dunn, MD
Chief Medical Officer